



Pacific Northwest
NATIONAL LABORATORY

Columns indicate the entity performing the task described and all associated IT buildout necessary to complete the task.

Process

Action

Decision Point

Callout/Notes

Input/Output

Digital or Printed Document

Start

End

Reject/Error/Invalid

Not dictated by DOE

Step only applies to equipment that requires installation by a qualified contractor

All **REQUIREMENTS** can be found in the Tools Requirements Document

Electrification Rebate Initiated by The Installer for A Single-Family, Owner-Occupied Home

The flowchart details the process for an installer-initiated electrification rebate. It begins with the Installer performing a mini home assessment and initiating a rebate request. The process then moves to the State lane for contractor eligibility verification. If eligible, the installer submits home address and upgrade information. The 3rd Party Back End lane handles the conversion of the home address to an address ID and the submission of eligibility verification. This leads to generating a rebate reservation and notifying the building owner. A rebate coupon is then issued, which is used by the Vendor to purchase equipment and materials. The Vendor performs the installation, and the Building Owner provides an invoice. The process concludes with the submission of proof of upgrade completion, validation of the installation, and the final reimbursement of the rebate payment to the Installer. The DOE Back End lane handles the reporting of project information for state retention.

```
graph TD
    subgraph Building_Owner [Building Owner]
        BO_Notify[Building Owner Notification]
        BO_Invoice[Invoice]
        BO_Pay[Pay contractor (minus approved rebate amount)]
        BO_Attest[Attest to installation at designated address]
        BO_End((End))
    end

    subgraph Installer [Installer]
        Start(( ))
        MiniAssess[Perform Mini Home Assessment]
        InitRebate[/Initiate Rebate Request/]
        Merge1(( ))
        SubmitHome[/Submit Home Address, Proposed Upgrade, and Vendor Selection/]
        Merge2(( ))
        ProvideInvoice[Provide Invoice to Building Owner]
        PerformInst[Perform Installation]
        ReceiveInvPay[Receive Invoice Payment]
        SubmitProof[/Submit Proof of Upgrade Completion/]
        Merge3(( ))
        ReceiveRebate[Receive Rebate Payment]
        End1((End))
    end

    subgraph Vendor [Vendor]
        PurchaseEq[Purchase equipment and materials]
        PerformInst
        SubmitProof
        Merge3
        ValidateInst{Validate Correct Installation}
        IssueReim[/Issue Rebate Reimbursement/]
        ReportInfo[Report All Project Information Necessary for DOE-Required State Retention]
        RetainInfo[Retain Required Project Information]
        End2((End))
    end

    subgraph State [State]
        EligibleList[Eligible Contractor List (Updated Daily)]
        NoteRural[In rural areas, exceptions may be made for installers that are not on the eligible contractor list.]
        VerifyContractor{Verify Contractor Eligibility}
        Merge1
        VerifyEligibility{Verify Eligibility  
• Income  
• Home  
• Contractor  
• Measure}
        Merge2
        ConvertAddr[Convert Home Address to Address ID]
        SubmitVer[/Submit Eligibility Verification and Address ID/]
        NotifyBO[/Notify Building Owner/]
        MustIncludeList[Must include:  
• Ability to cancel rebate reservation  
• Rebate amount available for home/building address]
        UseTemplate[Use DOE-Approved Template to Create Rebate Coupon]
        IssueCoupon[/Issue Rebate Coupon/]
        Merge4(( ))
    end

    subgraph BackEnd3 [3rd Party Back End]
        NotifyImpl[/Notify Implementer/]
        GenerateRes[Generate Rebate Reservation]
        Merge5(( ))
        Merge6(( ))
    end

    subgraph BackEndDOE [DOE Back End]
        End3((End))
    end

    NoteRural -.-> VerifyContractor
    EligibleList -.-> VerifyContractor
    Start --> MiniAssess
    MiniAssess --> InitRebate
    InitRebate --> Merge1
    Merge1 --> SubmitHome
    SubmitHome --> Merge2
    Merge2 --> VerifyEligibility
    VerifyEligibility -- Ineligible --> Merge1
    VerifyEligibility -- Eligible --> ConvertAddr
    ConvertAddr --> SubmitVer
    SubmitVer --> Merge3
    Merge3 --> ProvideInvoice
    ProvideInvoice --> BO_Invoice
    ProvideInvoice --> PurchaseEq
    PurchaseEq --> PerformInst
    PerformInst --> SubmitProof
    SubmitProof --> Merge3
    Merge3 --> ReceiveInvPay
    ReceiveInvPay --> BO_Pay
    BO_Pay --> BO_Attest
    BO_Attest --> BO_End
    SubmitProof --> ValidateInst
    ValidateInst -- Reject --> Merge1
    ValidateInst -- Accept --> IssueReim
    IssueReim --> Merge4
    Merge4 --> ReceiveRebate
    ReceiveRebate --> End1
    IssueReim --> Merge5
    Merge5 --> ReportInfo
    ReportInfo --> RetainInfo
    RetainInfo --> End2
    ReportInfo --> End3
    Merge6 --> End3
```

Invoice Must Include:

- Total cost
- Equipment and material costs
- Rebate amount applied to equipment/material costs

Must include:

- Ability to cancel rebate reservation
- Rebate amount available for home/building address

Must include:

- Install attestation
- Invoice
- Purchase receipt

Notice and coupon must show:

- Approved rebate amount
- Rebate bucket (percentage)
- Product type
- Address ID
- Coupon expiration date
- Notice that eligible entity representatives may be eligible for installation incentives of up to \$500, as determined by the state.

If address is in a disadvantaged community, coupon must show that additional installation incentives are available.

U.S. DEPARTMENT OF
ENERGY